
**Mountain Plains States Consortium
WIC System Project**

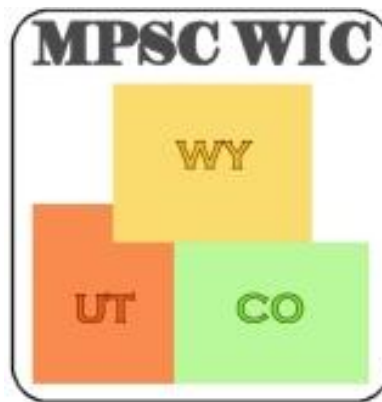
DDI DELIVERABLE #07

VM 1 VENDOR MANAGEMENT DETAILS

SCREENS DFDD

(DETAILED FUNCTIONAL DESIGN DOCUMENT)

Presented to:



Revision Date: December 21, 2007

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Document Revisions

| Revision Date | Updated By | Requested By | Description of Revision |
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1 Details

The Details branch node of the Vendor Management navigation tree allows the user to record information related to each vendor, such as demographic data, contact information, operation details, wholesalers, and sales and peer group information. The branch also contains options for viewing summary information about a vendor, including vendor status, events, and violations.

1.1 Demographics

The Demographics screen is used to enter, edit, or view demographic information about the vendor such as the name and address. An owner or a chain is also assigned on this screen. There is no historical data for the demographic information on this screen.

The Contacts grid is used to enter, edit, or view contact information for the vendor. It includes the staff member who is the contact for the selected vendor as well as the contact(s) for the vendor itself.

> *New Vendor (see VM Overview DFDD)* **OR**

> *Search (click on Vendor ID in Search Results – see VM Overview DFDD)* **OR**

> *Details > Demographics*

<Vendor Header (See VM overview)>

Vendor Name Vendor Alias Name Local Agency

Chain ☒ Show All Owner / ACH ☒ Show All

Address Type Address Line 1

Address to Use Address Line 2

Address Types on File: ☒ Physical ☐ Mailing

Current Vendor Address: 14 Maple Street
Suite 105
Boulder, Colorado 80304-1234

Location

Suite P. O. Box

City

State

Zip Code (+4)

County

Add Row Local Vendor Contact

Remove Row Local Vendor Contact Phone

| Contact Information | | | | | | | | |
|---------------------|------------|-----------|--------------|---------------|----------------|----------------|------------------|--------------|
| | First Name | Last Name | Contact Type | Contact Title | Phone Number | Fax Number | Email Address | Address Type |
| > | Thomas | Smith | Pharmacy | | (717) 691-8548 | (717) 691-8234 | tsmith@store.com | Physical |
| | John | Jones | Grocer | | (717) 283-2893 | (717) 691-8234 | Jjones@store.com | Mailing |

| Control | Description | | | |
|-------------------|--|--------------------------|------------|----|
| Vendor Name | The name of the vendor. It cannot be equal to the Vendor Alias Name. | | | |
| | Type | Text Box | | |
| | Required | Yes | | |
| | Length | 50 | | |
| | Validation | NA | | |
| | Display Only | No | Calculated | No |
| | DB Column | Vendor.StoreName | | |
| Vendor Alias Name | An alias for the Vendor Name. It cannot be equal to the Vendor Name. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 50 | | |
| | Validation | NA | | |
| | Display Only | No | Calculated | No |
| | DB Column | Vendor.AliasName | | |
| Local Agency | The primary local agency that the vendor services. It will default based on the county of the vendor and local agency. Value can be changed by the user. | | | |
| | Type | List Box | | |
| | Required | Yes | | |
| | DB Column | Vendor.LA_ID | | |
| | Code ID | LocalAgency table lookup | | |
| Chain | List box containing the chain that can be selected and associated with the vendor. List is populated with all active chains. | | | |
| | Type | List Box | | |
| | Required | No | | |
| | DB Column | Vendor.Chain_ID | | |
| | Code ID | VendorChain table lookup | | |

| Control | Description | | | |
|----------------------|--|---|------------|----|
| Chain - Show All | Check to expand the chain selection to all active chains in the state. | | | |
| | Type | Check Box | | |
| | Display Only | No | Calculated | No |
| Owner/ACH | List box containing the owner that can be selected and associated with the vendor. List is populated with all active owners. | | | |
| | Type | List Box | | |
| | Required | No | | |
| | DB Column | Vendor.VOwn_ID | | |
| | Code ID | VendorOwner table lookup | | |
| Owner/ACH - Show All | Check to expand the Owner List Box selection to all active owners in the state. | | | |
| | Type | Check Box | | |
| | Display Only | No | Calculated | No |
| | DB Column | NA | | |
| Address Type | Address Type is used to select the type of address for the selected Vendor that the user wants to view, edit or add. Types include Physical and Mailing. | | | |
| | Type | List Box | | |
| | Required | Yes | | |
| | DB Column | VendorAddress.AddressTypeCd | | |
| | Code ID | Address Type This code element is editable but these installed values are non-editable: Physical Mailing | | |

| Control | Description | | | |
|-----------------------|---|---|------------|----|
| Address to Use | The address information that the Vendor uses for the selected address type. The vendor can use its own address, its owner's address or its chain's address. | | | |
| | Type | List Box | | |
| | Required | Yes | | |
| | DB Column | Vendor.AddressUseCd | | |
| | Code ID | Address Use This code element is non-editable. The installed values are: Owner Vendor Chain | | |
| Address Types on File | Address Types on File is used to indicate the types of addresses on file for the displayed Vendor. The address type displayed is determined by the Address Types on File that is selected. Types include Physical and Mailing. The physical address is the default. | | | |
| | Type | List Box | | |
| | Required | Yes - At least one Physical address is required | | |
| | DB Column | VendorAddress.AddressTypeCd | | |
| | Code ID | Address Type This code element is editable but these installed values are non-editable: Physical Mailing | | |
| Address Line 1 | The first line of the vendor address. Either Address Line 1 must contain a value or P.O. Box must contain a value to have a valid address. | | | |
| | Type | Text Box | | |
| | Required | Yes – If no data in P.O. Box | | |
| | Length | 30 | | |
| | Validation | NA | | |
| | Display Only | Yes, if Use Vendor's address is not selected. | Calculated | No |
| | DB Column | VendorAddress.StreetAddrLine1 | | |

| Control | Description | | | |
|----------------|---|---|------------|----|
| Address Line 2 | The second, optional line of a WIC vendor address. It cannot contain data if Address Line 1 is blank. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 30 | | |
| | Validation | NA | | |
| | Display Only | Yes, if Use Vendor's address is not selected. | Calculated | No |
| | DB Column | VendorAddress.StreetAddrLine2 | | |
| Location | Location is where additional information regarding the physical location of the vendor, such as cross streets, can be stored. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 50 | | |
| | Validation | NA | | |
| | Display Only | Yes, if Use Vendor's address is not selected. | Calculated | No |
| | DB Column | VendorAddress.Location | | |
| Suite | The suite of a vendor address. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 5 | | |
| | Validation | NA | | |
| | Display Only | Yes, if Use Vendor's address is not selected. | Calculated | No |
| | DB Column | VendorAddress.Suite | | |

| Control | Description | | | |
|----------|--|---|------------|----|
| P.O. Box | The Post Office Box number of a vendor address. Either Address Line 1 must contain a value or P.O. Box must contain a value in order to have a valid address. This field is disabled if the Address Type = "Physical." | | | |
| | Type | Text Box | | |
| | Required | Yes – If no data in address line 1 | | |
| | Length | 5 | | |
| | Validation | NA | | |
| | Display Only | Yes, if Use Vendor's address is not selected. | Calculated | No |
| | DB Column | VendorAddress.POBox | | |
| City | The City component of the vendor address. When a ZIP Code is entered, and no value exists in the City, State and/or County fields, those fields are automatically populated based on the ZIP Code. If a ZIP Code has more than one possible City and/or County value, the choices are displayed in a pop-up window where the user must select the correct value. | | | |
| | Type | Text Box | | |
| | Required | Yes | | |
| | Length | 30 | | |
| | Validation | NA | | |
| | Display Only | Yes, if Use Vendor's address is not selected. | Calculated | No |
| | DB Column | VendorAddress.City | | |
| State | The State field identifies the state of the vendor's address. When a ZIP Code is entered, and no value exists in the City, State and/or County fields, those fields are automatically populated based on the ZIP Code. | | | |
| | Type | List Box | | |
| | Required | Yes | | |
| | DB Column | VendorAddress.State | | |
| | Code ID | State table lookup (StateAbbreviation field) | | |

| Control | Description | | | |
|----------|--|---|------------|----|
| Zip Code | The 5-digit ZIP Code of the vendor address. When a ZIP Code is entered, and no value exists in the City, State and/or County fields, those fields are automatically populated based on the ZIP Code. If a ZIP Code has more than one possible City and/or County value, the choices are displayed in a pop-up window where the user must select the correct value. | | | |
| | Type | Text Box | | |
| | Required | Yes | | |
| | Length | 5 | | |
| | Validation | Numeric and Complete | | |
| | Display Only | Yes, if Use Vendor's address is not selected. | Calculated | No |
| | DB Column | VendorAddress.ZipCode | | |
| (+4) | The optional, 4-digit ZIP Code extension of a vendor address. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 4 | | |
| | Validation | Numeric and Complete | | |
| | Display Only | Yes, if Use Vendor's address is not selected. | Calculated | No |
| | DB Column | VendorAddress.ZipPlus4 | | |
| County | The county where the vendor is located. When a ZIP Code is entered, and no value exists in the City, State and/or County fields, those fields are automatically populated based on the ZIP Code. If a ZIP Code has more than one possible City and/or County value, the choices are displayed in a pop-up window where the user must select the correct value. | | | |
| | Type | List Box | | |
| | Required | Yes | | |
| | DB Column | VendorAddress.CountyNm | | |
| | Code ID | County table lookup (Name field) | | |

| Control | Description | | | |
|----------------------------|---|---|------------|----|
| Current Vendor Address | Current vendor address is the displayed address formatted to display like a mailing label. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | NA | | |
| | Validation | NA | | |
| | Display Only | Yes | Calculated | No |
| | DB Column | VendorAddress.StreetAddrLine1, VendorAddress.StreetAddrLine2, Vendor.Suite, VendorAddress.POBox, VendorAddress.City, VendorAddress.State, VendorAddress.ZipCode, VendorAddress.ZipPlus4 | | |
| Add Row | Clicking the Add Row button creates a new row in the Contacts data grid and allows the user to complete the information about the vendor contact. | | | |
| | Type | Command Button | | |
| | Hot Key | Alt + A | | |
| Remove Row | Clicking the Remove Row command button removes the selected row from the data grid and marks the currently selected row (arrow pointer) as deleted in the database. | | | |
| | Type | Command Button | | |
| | Hot Key | Alt + R | | |
| Local Vendor Contact | A list of active staff persons. | | | |
| | Type | List Box | | |
| | Required | No | | |
| | DB Column | Vendor.Stfp_ID | | |
| | Code ID | StaffPerson table lookup | | |
| Local Vendor Contact Phone | The phone number of the selected local vendor contact. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 10 | | |
| | Validation | Numeric and Complete, Mask of (999) 999-9999 | | |
| | Display Only | No | Calculated | No |
| | DB Column | Vendor.ContactPhoneNr + Vendor.ContactAreaCd | | |

| Control | Description | | | |
|---------------|--|---|------------|----|
| First Name | The first name of the contact for the vendor. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 30 | | |
| | Validation | NA | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorContact.FirstName | | |
| Last Name | The last name of the contact for the vendor. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 30 | | |
| | Validation | NA | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorContact.LastName | | |
| Contact Type | Contact Type is used to select the type of contact being entered for the vendor. Types include: Primary, and others as designated. | | | |
| | Type | List Box | | |
| | Required | There must be a primary contact type. | | |
| | DB Column | VendorContact.ContactTypeCd | | |
| | Code ID | Contact Type This code element is editable but these installed values are non-editable: Primary | | |
| Contact Title | The title given to the contact person for the vendor and contact type. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 30 | | |
| | Validation | NA | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorContact.ContactTitle | | |

| Control | Description | | | |
|---------------|--|---|------------|----|
| Phone Number | The vendor's 10-digit business phone number, including area code. The first field is the area code. If the Default Area Code system parameter contains a value, that value is placed into the area code field by default. The second field is the phone number. Values cannot be keyed into the phone number field until an area code is keyed into the first field. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 10 | | |
| | Validation | Numeric and Complete, Mask of (999) 999-9999 | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorContact.BusPhoneAreaCd + VendorContact.BusPhoneNr | | |
| Fax Number | The vendor's 10-digit fax phone number, including area code. The first field is the area code. If the Default Area Code system parameter contains a value, that value is placed into the area code field by default. The second field is the phone number. Values cannot be keyed into the phone number field until an area code is keyed into the first field. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 10 | | |
| | Validation | Numeric and Complete, Mask of (999) 999-9999 | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorContact.FaxPhoneAreaCd + VendorContact.FaxPhoneNr | | |
| Email Address | The email address of the contact for the vendor and contact type. The address must contain [@] and [.]. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 50 | | |
| | Validation | Mask of xxxx@xxx.xxx , "@" and "." must be present. | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorContact.EmailAddress | | |

| Control | Description | |
|--------------|--|---|
| Address Type | Address Type is used to select the type of address being entered of the contact for the vendor and contact type. Types include Physical and Mailing. | |
| | Type | List Box |
| | Required | A physical address is required. |
| | DB Column | VendorContact.AddressTypeCd |
| | Code ID | Address Type This code element is editable but these installed values are non-editable: Physical Mailing |

Business Rules

1. Tab order for address goes from Address Line 1 to the Zip Code field. This tab order allows the user to use the automatic zip code database that is incorporated in the data system.
2. The Local Agency Name and Number are found by joining the LA_ID from the Vendor table to the LA_ID of the Local Agency table.
3. Either Street Address Line 1 or PO Box must be present for a valid address.
4. Pop-up window must be shown when the zip code entered contains more than one city or county.
5. The local agency field is populated with the Local Agency that services the county that the vendor is located in. If more than one local agency services a county, one of the local agencies is selected as the default. It can be modified by the user if necessary.
6. If the user selects Use Owner's Address, display the corresponding address data from the owner's address record. This address must be of the same Address type as the one selected for the vendor. When Use Owner's Address is selected, the corresponding fields on the vendor address are read-only.
7. If the user selects Use Owner's Address and the owner does not have the selected Address Type, display an error message.
8. If the user selects Use Owner's Address and the Owner's address changes, the same change(s) will be made to the Vendor's address.
9. If the user selects Use Chain's Address, display the corresponding address data from the chain's address record. This address must be of the same Address type as the one selected for the vendor. When Use Chain's Address is selected, the corresponding fields on the vendor address are read-only.
10. If the user selects Use Chain's Address and the chain does not have the selected Address Type, display an error message.
11. If the user selects Use Chain's Address and the Chain's address changes, the same change(s) will be made to the Vendor's address.
12. If the user does not select Use Owner's Address or Use Chain's Address, or they deselect it, clear the address fields and enable them for data entry.
13. A physical address is required.

Business Rules

14. If the address type for a selected address changes and there is a corresponding contact for the address type in the contacts grid, display error. For example, if an address type is changed from being a Mailing address to a Physical address, and there is a contact for the Mailing address in the contacts grid, display error.
15. For all vendor correspondence that includes a contact name, if the contact has an Address Type selected, that address type is used on the letter. If the address type is blank, use the mailing address of the vendor. If the mailing address does not exist for the vendor, use the physical address.
16. Only a chain or an owner can be assigned to the vendor. If a chain is selected, the owner list box and owner show all checkbox are disabled; conversely, if an owner is selected, the chain list box and chain show all checkbox are disabled.
17. If an active vendor is assigned a new owner, display warning message that the vendor should be terminated and a new application entered for the vendor with information regarding the new owner.
18. The Vendor Name cannot equal the Vendor Owner Alias Name. Display error.
19. If the Vendor Alias Name exists for another Vendor Alias Name, display warning.
20. If the Vendor Alias Name exists for another Vendor Name, display warning.
21. The date that the vendor is added (Vendor.InsertDt) is used for the TIP report to determine if the Vendor is a New Vendor (Position 19 in TIP file).
22. The P O Box field is disabled if the Address Type = "Physical."
23. If a vendor has an address type of 'Mailing,' that address is used for correspondence; otherwise, the 'Physical' address is used. If a vendor contact name is used in the correspondence, the Vendor Contact Name that is used is the contact who corresponds with the address type.
24. There is only one Primary contact for each address type. Display error. Each address type can have a different Primary contact.
25. The Local Vendor Contact defaults to the Local Agency Retail Coordinator for the selected vendor's local agency. More than one local agency can service the county that the vendor is located in, and therefore, more than one Local Agency Retail Coordinator could be found. Any one can be selected as the default. This field can be edited by the user.
26. If an address type is selected that does not have a corresponding address in the address area, display error. For example, if Mailing is selected, but no Mailing address is present in the address area, display error.
27. The records in the grid are sorted by Address Type, then Contact Type within Address Type.
28. When a new vendor is successfully added and saved, a Vendor ID is assigned to the Vendor. The first two digits of the Vendor ID designates the county and the last three digits is a sequential number within county. The Vendor ID is displayed in the header information (Refer to VM 0 Vendor Management Overview DFDD).
29. Address Line 2 cannot contain data if Address Line 1 is blank. Display error.

Developer Notes

1. When a Vendor Detail record is added, a Vendor Status record is added with a Vendor Status Code of "Pending" and a Status Change Reason Code of "Contacted by Vendor."
2. Concatenate the Local Agency ID with a "-" and the name of the Local Agency.

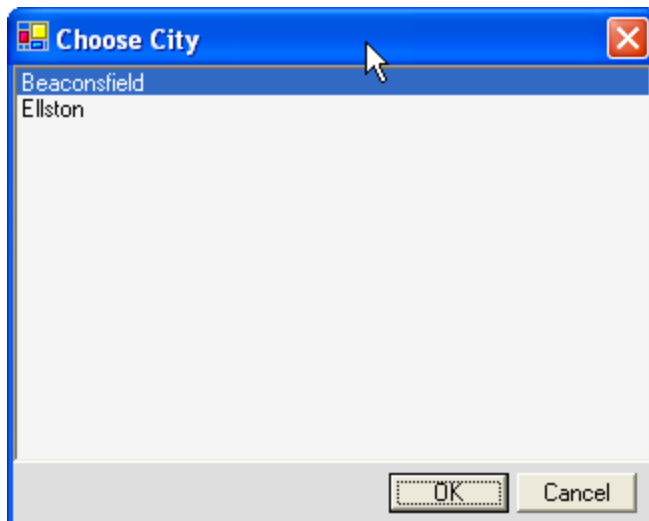
Developer Notes

3. Each address type entered is placed into the address collection for the vendor. When the Address Type Code list is displayed, place a check in each address type where appropriate.
4. There are no historical records for the addresses. When an edit is done on an existing address the data is replaced within the database records.
5. The code to be used for the email validation is:

```
Dim ex As New Regex("^([\\w-\\.]+)@((\\[[0-9]{1,3}\\.[0-9]{1,3}\\.[0-9]{1,3}\\.)|(([\\w-\\.]++)|([a-zA-Z]{2,4}|[0-9]{1,3})(\\?)$"))")
If Not ex.IsMatch(EmailAddress.Value)
Then
    'It is invalid
End IF
```
6. For the formatted address use the following:
 Address Line 1 (or PO Box)
 Address Line 2 (or Suite if present when there is no Address Line 2)
 Suite (if present and Address Line 2 is present)
 City, State Zip – Zip Plus 4 (if present)

1.1.1 Choose City/County/State Pop-Up Windows

The Choose City/County/State pop-up windows allow the user to select which City/County/State the vendor should be associated with. Within the ZIP+4 data base, some zip codes cover multiple cities or counties. If an unknown zip code is entered, the user is prompted to choose a state.

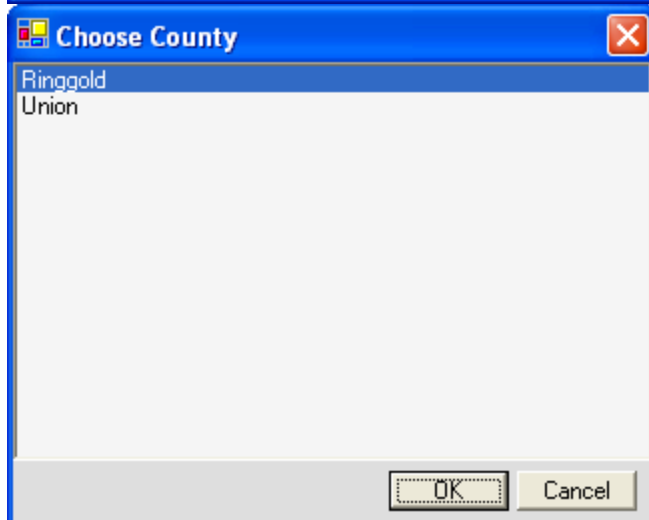


A Windows-style dialog box titled "Choose City" with a blue header bar and a red close button. It contains a list box with two items: "Beaconsfield" and "Ellston". At the bottom, there are "OK" and "Cancel" buttons.

Choose City

Beaconsfield
Ellston

OK Cancel

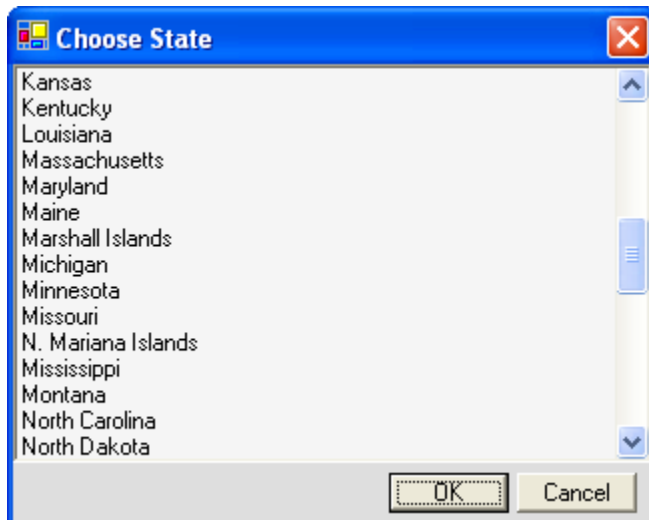


A Windows-style dialog box titled "Choose County" with a blue header bar and a red close button. It contains a list box with two items: "Ringgold" and "Union". At the bottom, there are "OK" and "Cancel" buttons.

Choose County

Ringgold
Union

OK Cancel



A Windows-style dialog box titled "Choose State" with a blue header bar and a red close button. It contains a list box with 16 items: Kansas, Kentucky, Louisiana, Massachusetts, Maryland, Maine, Marshall Islands, Michigan, Minnesota, Missouri, N. Mariana Islands, Mississippi, Montana, North Carolina, and North Dakota. A vertical scrollbar is on the right side of the list box. At the bottom, there are "OK" and "Cancel" buttons.

Choose State

Kansas
Kentucky
Louisiana
Massachusetts
Maryland
Maine
Marshall Islands
Michigan
Minnesota
Missouri
N. Mariana Islands
Mississippi
Montana
North Carolina
North Dakota

OK Cancel

1.2 Operations

The Operations screen is used to maintain basic information about the vendor, such as the business year, hours and times of operation and automated clearing house information.

> Details > Operations

<Vendor Header (See VM overview)>

Record Date 06/15/2007 1 of 99 New Edit Delete

Business Year Start 01/01 Business License No. 245679896846355 Food Stamp ID 5600836
Business Year End 12/31 Business State Colorado TIP Vendor Type Retail Vendor
Tax ID 135765635897354 # EBT Lanes 3
Print Price Surveys ☒ Vendor Has Scanners Yes
Scanners ID WIC Foods No

Days and Times of Operation

| Days | <input checked="" type="checkbox"/> 24 Hours | <input checked="" type="checkbox"/> Same Each Day | Begin Time | End Time |
|---|--|---|------------|----------|
| <input checked="" type="checkbox"/> All Days | | | | |
| <input checked="" type="checkbox"/> Sunday | | | | |
| <input checked="" type="checkbox"/> Monday | | | | |
| <input checked="" type="checkbox"/> Tuesday | | | | |
| <input checked="" type="checkbox"/> Wednesday | | | | |
| <input checked="" type="checkbox"/> Thursday | | | | |
| <input checked="" type="checkbox"/> Friday | | | | |
| <input checked="" type="checkbox"/> Saturday | | | | |

Automated Clearing House

☒ Participating in ACH Transactions

ACH Data To Use Owner's ACH Data

Bank Name Central Bank of Colorado
Routing Number 109203999
Account Number 0909908787667666

| Control | Description | | | |
|---------------------|--|--|------------|----|
| Record Date | This is the record selector for the Vendor Operations records. It contains the recorded date. The drop-down and spin control allow selection of historical Vendor Operations records. When the New button is clicked, this date defaults to current date. It can be updated by the user. | | | |
| | Type | Record Selector (using Editable Date Picker) | | |
| | Contents | Formatted date of 'mm/dd/yyyy' | | |
| | DB Column | VendorOperations.RecordedDt | | |
| New | Clicking the New command button creates a new Vendor Operations record. | | | |
| | Type | Command Button | | |
| | Hot Key | Alt + N | | |
| Edit | Clicking the Edit command button puts the currently displayed record into Edit mode. | | | |
| | Type | Command Button | | |
| | Hot Key | Alt + T | | |
| Delete | Clicking the Delete command button marks the record as deleted in the database upon user confirmation. | | | |
| | Type | Command Button | | |
| | Hot Key | Alt + D | | |
| Business Year Start | This date is the start date (month and day) for the business year of the vendor. | | | |
| | Type | Date Picker | | |
| | Required | No | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorOperations.BusinessYearStartDt | | |
| Business Year End | This date is the end date (month and day) for the business year of the vendor. | | | |
| | Type | Date Picker | | |
| | Required | No | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorOperations.BusinessYearEndDt | | |

| Control | Description | | | |
|----------------------|--|-------------------------------------|------------|----|
| Business License No. | This text box contains the business license number for the vendor. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 15 | | |
| | Validation | NA | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorOperations.LicenseNr | | |
| Business State | This list box contains the state in which the vendor does business. | | | |
| | Type | List Box | | |
| | Required | No | | |
| | DB Column | VendorOperations.StateAbbreviation | | |
| | Code ID | State table lookup | | |
| Tax ID | Contains the Federal Tax ID of a corporation or partnership, or the social security that identifies a sole proprietorship. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 15 | | |
| | Validation | NA | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorOperations.TaxID | | |
| Print Price Surveys | This check box signifies whether or not the vendor normally receives price surveys through the mail instead of by other means. This checkbox is used on the Setup Survey Screen when printing price surveys. The value of this checkbox is the default value on the Setup Survey Screen. It can be modified when printing the surveys. | | | |
| | Type | Check Box | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorOperations.PriceSurveyPrintIn | | |

| Control | Description | | | |
|-----------------|--|---|------------|----|
| Food Stamp ID | An identification number assigned to a vendor by the Food Stamp program. If entered, it must be 7 digits. This ID is used when producing the TIP Report. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 7 | | |
| | Validation | Numeric | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorOperations.FoodStampID | | |
| TIP Vendor Type | Indicates the USDA’s “The Integrity Program” (TIP) vendor type for the current vendor. Examples of TIP Vendor Type are Retail Vendor, Commissary and Pharmacy. This field is used when producing the TIP Report. | | | |
| | Type | List Box | | |
| | Required | Yes | | |
| | DB Column | VendorOperations.TipStoreTypeCd | | |
| | Code ID | TIP Store Type This code element is non-editable. The installed values are: Retail (R) WIC-only (W) Above 50% (A) Commissary (C) Pharmacy (P) Home Delivery (H) Direct Distribution Center (D) | | |
| # EBT Lanes | The number of EBT lanes located at the WIC vendor. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | Integer 2 | | |
| | Validation | Numeric | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorOperations.EBTLanesNr | | |

| Control | Description | | | |
|-----------------------------|---|--|------------|----|
| Vendor Has Scanners | A list box used to indicate whether or not the vendor is equipped with scanners. | | | |
| | Type | List Box | | |
| | Required | Yes | | |
| | DB Column | VendorOperations.ScannersCd | | |
| | Code ID | YesNo This code element is non-editable. The installed values are: Yes No | | |
| Scanners ID WIC Food | A list box used to indicate that scanners, when present, are able to identify WIC approved foods. | | | |
| | Type | List Box | | |
| | Required | Yes – if Vender Has Scanners is Yes | | |
| | DB Column | VendorOperations.ScansWICFoodsCd | | |
| | Code ID | YesNo This code element is non-editable. The installed values are: Yes No | | |
| Days and Times of Operation | The frame on the screen that indicates the hours and days of operation of the vendor. | | | |
| All Days | This check box signifies whether or not a vendor is open seven days a week. | | | |
| | Type | Check Box | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorOperations.SundayIn + VendorOperations.MondayIn + VendorOperations.TuesdayIn + ... VendorOperations.SaturdayIn | | |
| Sunday | This check box signifies whether or not a vendor is open on Sunday. | | | |
| | Type | Check Box | | |
| | Display Only | Yes, if All Days is checked | Calculated | No |
| | DB Column | VendorOperations.SundayIn | | |

| Control | Description | | | |
|-----------|--|------------------------------|------------|----|
| Monday | This check box signifies whether or not a vendor is open on Monday. | | | |
| | Type | Check Box | | |
| | Display Only | Yes, if All Days is checked | Calculated | No |
| | DB Column | VendorOperations.MondayIn | | |
| Tuesday | This check box signifies whether or not a vendor is open on Tuesday. | | | |
| | Type | Check Box | | |
| | Display Only | Yes, if All Days is checked | Calculated | No |
| | DB Column | VendorOperations.TuesdayIn | | |
| Wednesday | This check box signifies whether or not a vendor is open on Wednesday. | | | |
| | Type | Check Box | | |
| | Display Only | Yes, if All Days is checked | Calculated | No |
| | DB Column | VendorOperations.WednesdayIn | | |
| Thursday | This check box signifies whether or not a vendor is open on Thursday. | | | |
| | Type | Check Box | | |
| | Display Only | Yes, if All Days is checked | Calculated | No |
| | DB Column | VendorOperations.ThursdayIn | | |
| Friday | This check box signifies whether or not a vendor is open on Friday. | | | |
| | Type | Check Box | | |
| | Display Only | Yes, if All Days is checked | Calculated | No |
| | DB Column | VendorOperations.FridayIn | | |

| Control | Description | | | |
|-----------------------|---|-----------------------------------|------------|----|
| Saturday | This check box signifies whether or not a vendor is open on Saturday. | | | |
| | Type | Check Box | | |
| | Display Only | Yes, if All Days is checked | Calculated | No |
| | DB Column | VendorOperations.SaturdayIn | | |
| 24 Hours | This check box signifies whether or not a vendor is open 24 hours a day. | | | |
| | Type | Check Box | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorOperations.AllDayIn | | |
| Same Each Day | This check box signifies whether or not a vendor has the same operating hours each day. | | | |
| | Type | Check Box | | |
| | Display Only | No | Calculated | No |
| | DB Column | NA | | |
| All Days - Begin Time | The time the vendor opens when Same Each Day is checked. | | | |
| | Type | List Box | | |
| | Required | No | | |
| | DB Column | VendorOperations.AllWeekBeginTime | | |
| All Days - End Time | The time the vendor closes when Same Each Day is checked. | | | |
| | Type | List Box | | |
| | Required | No | | |
| | DB Column | VendorOperations.AllWeekEndTime | | |
| Sunday Begin Time | The time the vendor opens on Sunday. | | | |
| | Type | List Box | | |
| | Required | No | | |
| | DB Column | VendorOperations.SundayBeginTime | | |
| Sunday End Time | The time the vendor closes on Sunday. | | | |
| | Type | List Box | | |
| | Required | No | | |
| | DB Column | VendorOperations.SundayEndTime | | |

| Control | Description | |
|----------------------|--|-------------------------------------|
| Monday Begin Time | The time the vendor opens on Monday. | |
| | Type | List Box |
| | Required | No |
| | DB Column | VendorOperations.MondayBeginTime |
| Monday End Time | The time the vendor closes on Monday. | |
| | Type | List Box |
| | Required | No |
| | DB Column | VendorOperations.MondayEndTime |
| Tuesday Begin Time | The time the vendor opens on Tuesday. | |
| | Type | List Box |
| | Required | No |
| | DB Column | VendorOperations.TuesdayBeginTime |
| Tuesday End Time | The time the vendor closes on Tuesday. | |
| | Type | List Box |
| | Required | No |
| | DB Column | VendorOperations.TuesdayEndTime |
| Wednesday Begin Time | The time the vendor opens on Wednesday. | |
| | Type | List Box |
| | Required | No |
| | DB Column | VendorOperations.WednesdayBeginTime |
| Wednesday End Time | The time the vendor closes on Wednesday. | |
| | Type | List Box |
| | Required | No |
| | DB Column | VendorOperations.WednesdayEndTime |
| Thursday Begin Time | The time the vendor opens on Thursday. | |
| | Type | List Box |
| | Required | No |
| | DB Column | VendorOperations.ThursdayBeginTime |
| Thursday End Time | The time the vendor closes on Thursday. | |
| | Type | List Box |
| | Required | No |
| | DB Column | VendorOperations.ThursdayEndTime |

| Control | Description | |
|-----------------------------------|--|------------------------------------|
| Friday Begin Time | The time the vendor opens on Friday. | |
| | Type | List Box |
| | Required | No |
| | DB Column | VendorOperations.FridayBeginTime |
| Friday End Time | The time the vendor closes on Friday. | |
| | Type | List Box |
| | Required | No |
| | DB Column | VendorOperations.FridayEndTime |
| Saturday Begin Time | The time the vendor opens on Saturday. | |
| | Type | List Box |
| | Required | No |
| | DB Column | VendorOperations.SaturdayBeginTime |
| Saturday End Time | The time the vendor closes on Saturday. | |
| | Type | List Box |
| | Required | No |
| | DB Column | VendorOperations.SaturdayEndTime |
| Automated Clearing House | Group box that contains information regarding Automated Clearing House (ACH) information. | |
| Participating in ACH Transactions | Checkbox that indicates the vendor is participating in automated clearing house transactions. Defaults to checked for EBT state. | |
| | Type | Checkbox |
| | Required | Yes, if EBT State |
| | DB Column | VendorOperations.ACHIn |

| Control | Description | | | |
|-----------------|---|---|------------|----|
| ACH Data To Use | The Banking information that the Vendor uses if it participates in ACH transactions. It is only available if "Participating in ACH Transactions" has been selected. | | | |
| | Type | List Box | | |
| | Required | Non-EBT State: Yes, if "Participating in ACH Transactions" has been selected. EBT State: Yes. | | |
| | DB Column | VendorOperations.ACHDataCd | | |
| | Code ID | ACH Info This code element is non-editable. The installed values are: Vendor Chain Owner | | |
| Bank Name | The name of the vendor’s bank that is used when processing automated clearing house transactions. | | | |
| | Type | Text Box | | |
| | Required | Non-EBT State: Yes, if "Participating in ACH Transactions" has been selected. EBT State: Yes. | | |
| | Length | 30 | | |
| | Validation | NA | | |
| | Display Only | Yes, if Use Owner’s/ACH Bank Account or Use Chain’s Bank Account Info is checked. | Calculated | No |
| | DB Column | VendorOperations.ACHBankName | | |

| Control | Description | | | |
|----------------|--|--|------------|----|
| Routing Number | The routing number of the vendor’s bank that is used when processing automated clearing house transactions. | | | |
| | Type | Text Box | | |
| | Required | Non-EBT State: Yes, if "Participating in ACH Transactions" has been selected. EBT State: Yes. | | |
| | Length | 9 | | |
| | Validation | NA | | |
| | Display Only | Yes, if Use Owner’s/ACH Bank Account or Use Chain’s Bank Account Info is checked. | Calculated | No |
| | DB Column | VendorOperations.ACHRoutingNumber | | |
| Account Number | The bank account number of the vendor’s bank that should be used when processing automated clearing house transactions | | | |
| | Type | Text Box | | |
| | Required | Non-EBT State: Yes, if "Participating in ACH Transactions" has been selected. EBT State: Yes. | | |
| | Length | 17 | | |
| | Validation | NA | | |
| | Display Only | Yes, if Use Owner’s/ACH Bank Account or Use Chain’s Bank Account Info is checked. | Calculated | No |
| | DB Column | VendorOperations.ACHAccountNumber | | |

| Control | Description | | |
|----------------------------------|---|--|----------------------|
| <Last Modified By User and Date> | In the lower right-hand corner, the user and the date of the last update of the vendor operations record are displayed. | | |
| | Type | Text Box | |
| | Required | No | |
| | Length | NA | |
| | Validation | Mask of 'firstname lastname mm/dd/yyyy' | |
| | Display Only | Yes | Calculated No |
| | DB Column | VendorOperations.ModifyStfpID VendorOperations.ModifyDt | |

| Business Rules |
|---|
| <ol style="list-style-type: none"> When New is selected and there is an existing Vendor Operations record, all data fields are populated with the values from the most recent existing Vendor Operations record. The record date is the date that the New button is clicked. Business Year End cannot be before Business Year Start. Business Year End cannot be entered if there is no Business Year Start. If Vendor has Scanners = "yes" the field "Scanners ID WIC Foods" is enabled and required. If "All Days" is checked, the Sunday through Saturday check boxes are selected automatically. If 24 hours is selected, all begin and end times are disabled. If "Same Each Day" is selected, the Begin Time and End Time for Sunday is enabled. When the record is saved, the Begin and End Times for the remainder of the week are populated with the Begin and End Times entered for Sunday. For non-EBT State, if Participating in ACH Transactions is selected, "ACH Data to Use" is enabled; otherwise, it is disabled. For EBT State, Participating in ACH Transactions defaults to selected and it cannot be deselected. If ACH Data to Use = Owner's ACH Info, Bank Name, Routing Number and Account Number is filled in from the Owner's record, and the fields are disabled. If no owner's data exists, display a warning message. The ACH data cannot be saved without data in the ACH fields. If ACH Data to Use = Chain's ACH Info, Bank Name, Routing Number and Account Number are populated from the Chain's record, and the fields are disabled. If no chain's data exists, display a warning message. The ACH data cannot be saved without data in the ACH fields. If ACH Data to Use = Vendor's ACH Info, Bank Name, Routing Number and Account Number are enabled and required. If the Food Stamp ID entered matches the Food Stamp ID for any other vendor present in the system, display a warning. The use of duplicate Food Stamp IDs is permitted. If the Food Stamp ID is entered, it must be 7 digits. Display error. |

Developer Notes

1. All Begin and End time list boxes are populated in the format of HH:MM AM/PM. The interval to use when generating the list is one hour (beginning at 12:00 AM and ending at 12:00 PM).

1.3 Vendor's Wholesalers

The Vendor's Wholesalers screen is used to maintain Wholesalers that do business with the selected vendor.

> *Details* > *Vendor's Wholesalers*

<Vendor Header (See VM overview)>

| Control | Description | |
|---------------------|---|--------------------------|
| Formula Wholesalers | The Formula Wholesalers box represents all of the formula wholesalers attached to this vendor. | |
| | Type | Checkboxes |
| | Required | No |
| | DB Column | VendorWholesaler.Vend_ID |
| | Code ID | Wholesaler table lookup |
| Wholesalers | The Wholesalers box represents all of the wholesalers, other than formula wholesalers, attached to this vendor. | |
| | Type | Checkboxes |
| | Required | No |
| | DB Column | VendorWholesaler.Vend_ID |
| | Code ID | Wholesaler table lookup |

Business Rules

1. Only those wholesalers marked as being a formula wholesaler on the wholesaler screen will be included in the Formula Wholesalers list.
2. Formula wholesalers will not be included on the wholesalers list.

Developer Notes

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1.4 Sales

The Sales screen is used to maintain sales information for the vendor, such as the food stamp sales, food stamp eligible sales, calendar YTD WIC sales, and previous calendar month WIC sales. There also are some calculated fields that compare the WIC sales versus the food stamp sales and food stamp eligible sales.

> *Details* > *Sales*

<Vendor Header (See VM overview)>

| | | | | | | | | | | | | |
|--|------------|--|--|---|------------|--|--|-------------|--|------|--|--------|
| Record Date | 06/15/2007 | | | 1 | of 99 | | | New | | Edit | | Delete |
| Calendar YTD WIC Sales: \$334,119.20 | | | Previous Calendar Month WIC Sales: \$77,868.12 | | | Last Calendar Year WIC Sales: \$934,418.00 | | | | | | |
| <input type="button" value="Calculate Comparisons"/> | | | Begin Date | | 01/01/2007 | End Date | | 1/31/2007 | | | | |
| | | | Food Stamp Sales | | \$8,123.10 | FS Eligible Sales | | \$12,110.10 | | | | |
| WIC Sales: \$3,223.30 | | | WIC Sales vs. Food Stamp Sales: 40% | | | WIC Sales vs. FS Eligible Sales: 27% | | | | | | |
| | | | Proof of FS Eligible Sales | | | | | | | | | |

| Control | Description | | | |
|------------------------|--|--|------------|-----|
| New | Clicking the New command button creates a new Sales record. | | | |
| | Type | Command Button | | |
| | Hot Key | Alt + N | | |
| Edit | Clicking the Edit command button enables all editable fields within the Sales screen for update. | | | |
| | Type | Command Button | | |
| | Hot Key | Alt + T | | |
| Delete | Clicking the Delete command button marks the record as deleted in the database upon user confirmation. | | | |
| | Type | Command Button | | |
| | Hot Key | Alt + D | | |
| Record Date | This is the record selector for the Vendor Sales records. It contains the recorded date. The drop-down and spin control allow selection of historical Vendor Sales records. When the New button is clicked, this date defaults to the current date. It can be updated by the user. The Record Date is the date used to determine the sales amounts to display in the Calendar YTD WIC Sales, Previous Calendar Month WIC Sales and the Last Calendar Year WIC Sales. | | | |
| | Type | Record Selector (using Editable Date Picker) | | |
| | Contents | Formatted date of "mm/dd/yyyy" | | |
| | DB Column | VendorSales.RecordedDt | | |
| Calendar YTD WIC Sales | The year-to-date sales of WIC foods as measured by the accumulation of redemptions. This is the accumulation of sales from the first day of the calendar year of the record date up until the last time the WIC Sales batch job was run. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | NA | | |
| | Validation | Mask of \$9,999.99 | | |
| | Display Only | Yes | Calculated | Yes |
| | DB Column | NA | | |

| Control | Description | | | |
|-----------------------------------|--|--------------------------|------------|-----|
| Previous Calendar Month WIC Sales | The previous month's WIC sales. The previous calendar month is defined as the most recent month that the WIC Sales batch job was run prior to the Record Date. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | NA | | |
| | Validation | Mask of \$99,999.99 | | |
| | Display Only | Yes | Calculated | No |
| | DB Column | NA | | |
| Last Calendar Year WIC Sales | The total sales of WIC foods as measured by the accumulation of redemptions for the last calendar year. The last calendar year is defined as the most recent January through December sales amounts prior to the Record Date. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | NA | | |
| | Validation | Mask of \$9,999.99 | | |
| | Display Only | Yes | Calculated | Yes |
| | DB Column | NA | | |
| Calculate Comparisons | Clicking the Calculate Comparisons command button calculates the WIC Sales vs Food Stamp Sales if Food Stamp Sales were entered. The WIC Sales vs FS Eligible Sales is calculated if FS Eligible Sales were entered. The WIC Sales is calculated in either case. This command button is not enabled until a valid time period has been entered and either the Food Stamp Sales or the FS Eligible Sales have been entered. | | | |
| | Type | Command Button | | |
| | Hot Key | Alt + L | | |
| Begin Date | This date marks the begin date for which the calculations are to be applied. It must be the first day of a month. | | | |
| | Type | Date Picker | | |
| | Required | No | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorSales.SalesBeginDt | | |

| Control | Description | | | |
|-------------------|---|-------------------------------|------------|-----|
| End Date | This date marks the end date for which the calculations are to be applied. It must be the last day of a month. | | | |
| | Type | Date Picker | | |
| | Required | No | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorSales.SalesEndDt | | |
| Food Stamp Sales | The Vendor’s total food stamp sales. May be used in Peer Group calculation. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | Decimal 11,2 | | |
| | Validation | Numeric, Mask of \$9,999.99 | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorSales.FoodStampSales | | |
| FS Eligible Sales | The Vendor’s total sales of food stamp eligible items. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | Decimal, 11,2 | | |
| | Validation | Numeric, Mask of \$9,999.99 | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorSales.EligibleFoodSales | | |
| WIC Sales | The total sales of WIC foods as measured by the accumulation of redemptions during the Begin and End Dates entered. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | Decimal, 11,2 | | |
| | Validation | Numeric, Mask of \$9,999.99 | | |
| | Display Only | Yes | Calculated | Yes |
| | DB Column | NA | | |

| Control | Description | | | |
|----------------------------------|--|---|------------|-----|
| WIC Sales vs. Food Stamp Sales | The percentage of the vendor's WIC sales versus the vendor's food stamp sales as calculated by dividing the total WIC sales by the food stamp sales for the time period entered in the Begin Date and End Date fields. The calculation is performed if a value is entered in the Food Stamp Sales field and the Calculation Comparisons command button is selected. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 3 | | |
| | Validation | Mask of 99% | | |
| | Display Only | Yes | Calculated | Yes |
| | DB Column | NA | | |
| WIC Sales vs. FS Eligible Sales | The percentage of the vendor's WIC sales versus the vendor's food stamp eligible sales as calculated by dividing the total WIC sales by the food stamp eligible sales for the time period entered in the Begin Date and End Date fields. The calculation is performed if a value is entered in the FS Eligible Sales field and the Calculation Comparisons command button is selected. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 3 | | |
| | Validation | Mask of 99% | | |
| | Display Only | Yes | Calculated | Yes |
| | DB Column | NA | | |
| Proof of FS Eligible Sales | This box represents the Vendor's proof of FS Eligible Sales. | | | |
| | Type | List Box | | |
| | Required | Yes, if the FS Sales are less than the Calendar YTD WIC Sales | | |
| | DB Column | VendorSales.ProofFSSalesCd | | |
| | Code ID | FS Eligible Sales Proof | | |
| <Last Modified By User and Date> | In the lower right-hand corner, the user and the date of the last update of the sales record are displayed. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | NA | | |
| | Validation | Mask of 'firstname lastname mm/dd/yyyy' | | |
| | Display Only | Yes | Calculated | No |

| Control | Description | |
|---------|------------------|--|
| | DB Column | VendorSales.ModifyStfpID VendorSales.ModifyDt |

Business Rules

1. If entered, the Begin Date must precede the End Date. Display error.
2. If an End Date is entered, a Begin Date must be entered. Display error.
3. If an End Date is entered, it must be the last day of the month. Display error.
4. If a Begin Date is entered, it must be the first day of the month. Display error.
5. The Begin Date cannot be in the future. Display error.
6. The End Date cannot be in the future. Display error.
7. If a Begin Date is entered, but no End Date is entered, the End Date will be automatically populated with the most recent End Date that is available. For example, if the current date is November 10, 2007 and the End Date has not been entered, the End Date will be populated with October 31, 2007. The most recent End Date that is available is determined by the date the most recent WIC Sales batch job was run.
8. Food Stamp Eligible Sales cannot be less than Food Stamp Sales. Display error.
9. The WIC Sales vs FS Sales percentage is calculated by dividing the WIC Sales amount by the user-entered food stamp sales.
The WIC Sales amount is calculated by adding the WIC Sales for each month that is available in the VendorMonthlySales table during the timeframe indicated by the Begin Date and End Date.
For example, if the WIC Sales batch job was last run on July 1, 2007 and the Begin Date entered was January 1, 2007 and the End Date entered was March 31, 2007, the following calculation would be performed:
January Sales for displayed Vendor +
February Sales for displayed Vendor +
March Sales for displayed Vendor = WIC Sales amount
10. WIC Sales vs FS Eligible Sales percentage is calculated by dividing the WIC Sales amount by the user-entered food stamp eligible sales. The WIC Sales amount is calculated as described in the preceding Business Rule.
11. The Previous Calendar Month WIC Sales is populated from the VendorMonthlySales table. The most recent WIC Sales available prior to the Record Date is used.
For example, if the WIC Sales batch job was last run on October 31, 2007 and the Record Date entered is August 19, 2007, the Previous Calendar Month WIC Sales would be the sales for July 2007.
12. The Calendar YTD WIC Sales is calculated by adding the WIC Sales available in the VendorMonthlySales table for each month, beginning in January of the Record Date year through the month of the Record Date.
For example, if the WIC Sales batch job was last run on June 31, 2007 and the Record Date entered is May 1, 2007 the following calculation would be performed:
January Sales for displayed Vendor +
February Sales for displayed Vendor +

Business Rules

- March Sales for displayed Vendor +
April Sales for displayed Vendor = Calendar YTD WIC Sales
13. The Last Calendar YTD WIC Sales is calculated by adding the WIC Sales available in the VendorMonthlySales table for each month, beginning in January and ending in December of the year prior to the Record Date year.
For example, if the WIC Sales batch job was last run on June 31, 2007 and the Record Date entered is January 1, 2007 the following calculation would be performed:
January 2006 Sales for displayed Vendor +
February 2006 Sales for displayed Vendor +
March 2006 Sales for displayed Vendor +
<April 2006 through September 2006>
October 2006 Sales for displayed Vendor +
November 2006 Sales for displayed Vendor +
December 2006 Sales for displayed Vendor = Last Calendar YTD WIC Sales
14. If the FS Sales are less than the Calendar YTD WIC Sales then Proof of FS Eligible Sales is a required field. Display error.
15. If any of the WIC Sales amounts are not available for the period entered, a 0 is displayed. This could occur if a Sales record is added before the first WIC Sales batch job is run after the system is put into production, or the system has not been in production for at least a year and conversion data was not available.

Developer Notes

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1.5 Peer Group


The Peer Group screen is used to maintain peer group factors for the vendor, such as the peer group type, structure, geography, square footage and # of registers. The Vendor peer group system is a means of classifying authorized vendors into groups based on common characteristics or criteria that affect food prices for the purpose of applying appropriate competitive price criteria to vendors at authorization and limiting payments for food to competitive levels.


The recalculate peer group command button is available for use when any of the factors change. The peer group itself can be overridden manually by someone with sufficient security privilege.


> Details > Peer Group

<Vendor Header (See VM overview)>

Record Date 06/15/2007  < 1 of 99 >  New  Edit  Delete


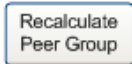
Peer Group Type Grocery  Pharmacy ☐

Structure Sole Ownership  WIC 50% Store ☐

Geography Remote Rural 

Square Footage 12,000

of Registers 3

Peer Group 2  

| Control | Description | | | |
|-----------------|--|---|------------|----|
| New | Clicking the New command button creates a new Peer Group record. | | | |
| | Type | Command Button | | |
| | Hot Key | Alt + N | | |
| Edit | Clicking the Edit command button enables all fields within the Peer Group screen for update. | | | |
| | Type | Command Button | | |
| | Hot Key | Alt + T | | |
| Delete | Clicking the Delete command button marks the record as deleted in the database upon user confirmation. | | | |
| | Type | Command Button | | |
| | Hot Key | Alt + D | | |
| Record Date | This is the record selector for the Vendor Peer Group records. It contains the recorded date. The drop-down and spin control allow selection of historical Vendor Peer Group records. When the New button is clicked, this date defaults to current date. It can be updated by the user. | | | |
| | Type | Record Selector (using Editable Date Picker) | | |
| | Contents | Formatted date of 'mm/dd/yyyy' | | |
| | DB Column | VendorPGFactors.RecordedDt | | |
| Peer Group Type | Indicates the peer group type for the current vendor. Examples are grocery or special. May be used in Peer Group calculation. | | | |
| | Type | List Box | | |
| | Required | Yes | | |
| | DB Column | VendorPGFactors.PeerGroupStoreTypeCd | | |
| | Code ID | Peer Group Store Type This code element is non-editable. The installed values are: Grocery Special Unknown | | |
| Pharmacy | Checkbox indicating that the vendor has a pharmacy inside or the vendor itself is a pharmacy. | | | |
| | Type | Checkbox | | |
| | DB Column | VendorPGFactors.PharmacyIn | | |
| | Display Only | No | Calculated | No |

| Control | Description | | | |
|---------------|---|---|------------|----|
| WIC 50% Store | Checkbox indicating that the vendor considers its WIC sales to be equal to or greater than 50% of its total sales. | | | |
| | Type | Checkbox | | |
| | DB Column | VendorPGFactors.50PercentIn | | |
| | Display Only | No | Calculated | No |
| Structure | List box containing all available structures such as sole ownership, partnership, corporation. May be used in Peer Group calculation. | | | |
| | Type | List Box | | |
| | Required | Yes | | |
| | DB Column | VendorPGFactors.StructureCd | | |
| | Code ID | Store Structure This code element is non-editable. The installed values are: Sole Ownership Partnership Corporation Unknown | | |
| Geography | List box containing all geography types such as Rural or Urban. May be used in Peer Group calculation. | | | |
| | Type | List Box | | |
| | Required | No | | |
| | DB Column | VendorPGFactors.GeographicCd | | |
| | Code ID | GeoIndicator This code element is non-editable. The installed values are: Remote Rural Rural Slightly Urban Urban Metro Market Edge Metro Market Center | | |

| Control | Description | | | |
|------------------------|--|---|------------|----|
| Square Footage | The total square footage of the vendor’s physical location. This includes sales area and storage area for the location. May be used in Peer Group calculation. | | | |
| | Type | Text Box | | |
| | Required | Yes | | |
| | Length | Integer 9 | | |
| | Validation | Numeric, Mask of 9,999 | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorPGFactors.SqFootage | | |
| # of Registers | The number of cash registers located at the WIC vendor. May be used in Peer Group calculation. | | | |
| | Type | Text Box | | |
| | Required | Yes | | |
| | Length | Integer 2 | | |
| | Validation | Numeric | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorPGFactors.NumOfRegisters | | |
| Peer Group | Contains the peer group number. A peer group number is able to be Statewide due to it being a WIC 50% vendor. | | | |
| | Type | List Box | | |
| | Required | Yes, if the Vendor Status is a status where the system sends the vendor information to the bank (which allows redemptions). | | |
| | DB Column | VendorPGFactors.PG_ID | | |
| | Code ID | PeerGroup | | |
| Recalculate Peer Group | Clicking the Recalculate Peer Group command button forces a calculation of the Vendor’s peer group. | | | |
| | Type | Command Button | | |
| | Hot Key | Alt + L | | |

| Control | Description | | |
|----------------------------------|---|--|----------------------|
| <Last Modified By User and Date> | In the lower right-hand corner, the user and the date of the last update of the peer group factor record are displayed. | | |
| | Type | Text Box | |
| | Required | No | |
| | Length | NA | |
| | Validation | Mask of 'firstname lastname mm/dd/yyyy' | |
| | Display Only | Yes | Calculated No |
| | DB Column | VendorPGFactors.ModifyStfpID VendorPGFactors.ModifyDt | |

Business Rules

1. The Recalculate Peer Group command button is disabled until the New or Edit command button is clicked and the user has security rights for this function.
2. By the Vendor Status, the system determines whether vendor information is included in the banking interface file (which allows redemptions). An error will occur if a vendor has a status of this type (i.e. Active) and the peer group number is blanked out.
3. The Peer Group list box values come from the PeerGroup.Number except for the one that matches the value of the Vendor.WIC50%PeerGroupNumber parameter. It has the value of the Vendor.WIC50%Name parameter displayed for it.

Developer Notes

1. When vendor information is saved the peer group is calculated and returned. This is done on an insert only. Peer Group is assigned based on multiple factors from the Vendor screen and will not be populated until the Vendor screen is completed and saved. After all data is entered a peer group algorithm runs that looks at the following fields and the associated parameters to determine the vendor's peer group:

Criteria – Peer Group Type

Factors:

Square Footage

of Registers and Structure

Food Stamp Sales

Geography

Each factor has an assigned min and max value that has been stored in the peer group data table in the database. The factor value entered is compared with the min and max and the appropriately assigned weighting factor is then multiplied by the peer group attribute for that factor. This value is held in a temporary storage location as an accumulator. The process is followed for all factors entered. The resultant value in temporary storage is then returned back to the user interface as the peer group value for that particular vendor.

| System Parameter | Purpose | Format |
|---------------------------|--|-----------|
| Vendor.WIC50%PeerGroupNbr | Contains the peer group number for the WIC 50% vendors (10) | Integer |
| Vendor.WIC50%Name | Contains the name of the WIC 50% Peer Group (i.e. Statewide) (10 characters) | Character |

1.6 Status/Summaries/Log

The Status/Summaries/Log branch node of the Vendor Management navigation tree allows the user to view vendor status, summary information about events and violations, and a vendor log.

1.6.1 Status

The Status screen is used to add, edit, or delete vendor status records. Information found on this screen includes Vendor Status, Reason for Status Change, Termination Reasons and Disqualification End Date. There is also a hyperlink to the Appeal Log. The Appeal Log is only available when the Appealed checkbox is selected.

> Details > Status/Summaries/Log > Status

<Vendor Header (See VM overview)>

The screenshot displays the Vendor Status form with the following elements:

- Record Dates:** A date selector set to 03/22/2007, followed by navigation icons and a page indicator '1 of 99'.
- Actions:** Buttons for 'New', 'Edit', and 'Delete'.
- Vendor Status:** A dropdown menu currently showing 'Closed'.
- Reason For Status Change:** A dropdown menu currently showing 'Store Closed'.
- Appealed:** An unchecked checkbox.
- Termination Reasons:** A list box containing four options: 'Store Closed' (checked), 'Store Under Construction', 'Store Burned Down', and 'Moving to New Location'.
- Disqualification End Date:** An empty date dropdown field.
- Links:** A dashed box on the left containing a link labeled 'Appeal Log'.

| Control | Description | |
|--------------------------|--|---|
| Record Dates | The Record Date is the date that the user created/edited the Status Record. | |
| | Type | Record Selector (using Editable Date Picker) |
| | Contents | Date of recording of status |
| | DB Column | VendorStatus.RecordedDt |
| New | Clicking the New command button creates a new vendor status record. | |
| | Type | Command Button |
| | Hot Key | Alt + N |
| Edit | Clicking the Edit command button puts the currently displayed status record into Edit mode. | |
| | Type | Command Button |
| | Hot Key | Alt + T |
| Delete | Clicking the Delete command button marks the record as deleted in the database upon user confirmation. | |
| | Type | Command Button |
| | Hot Key | Alt + D |
| Appeal Log | Hyperlink to Appeal Log pop-up window. See the Appeal Log Pop-Up Window section for more information. | |
| | Type | Link – only enabled when the Appealed checkbox is selected. |
| Vendor Status | List box that contains all available vendor statuses. | |
| | Type | List Box |
| | Required | Yes |
| | DB Column | VendorStatus.VendorStatusCd |
| | Code ID | VendorStatusCode table lookup |
| Reason for Status Change | When a status change occurs for a vendor, a status change reason is required. | |
| | Type | List Box |
| | Required | Yes, when there is a status change. |
| | DB Column | VendorStatus.StatusChgReasonCd |
| | Code ID | VendorStatusChangeCode table lookup |

| Control | Description | | | |
|----------------------------------|--|--|------------|----|
| Appealed | A checkbox indicating that a vendor appealed denial of authorization as a WIC vendor or their termination as a WIC vendor. | | | |
| | Type | Check Box | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorStatus.AppealedIneligIn | | |
| Termination Reasons | A list box containing all reasons for termination or closing. | | | |
| | Type | List Box | | |
| | Required | Yes, if “Closed” is selected in Vendor Status | | |
| | DB Column | VendorTermination.TermReasonCd | | |
| | Code ID | Vendor Term Reason This code element is editable but these installed values are non-editable: Reauthorization Failed | | |
| Disqualification End Date | This date represents the end of the disqualification period. | | | |
| | Type | Date Picker | | |
| | Required | No | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorStatus.DisqualificationEndDt | | |
| <Last Modified By User and Date> | In the lower right-hand corner, the user and the date of the last update of the vendor status record are displayed. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | NA | | |
| | Validation | Mask of 'firstname lastname mm/dd/yyyy' | | |
| | Display Only | Yes | Calculated | No |
| | DB Column | VendorStatus.ModifyStfpID + VendorStatus.ModifyDt | | |

Business Rules

1. Vendor Status selection controls the values available in the Reason For Status Change.
2. By the Vendor Status, the system determines whether vendor information is included in the banking interface file (which allows redemptions). An error occurs if a vendor status of this type (i.e. Active) is selected but no peer group has been set on the Store Info screen.
3. A change of Vendor Status clears the Reason For Status Change.
4. The Termination Reasons list box requires at least one selection but must allow for

Business Rules

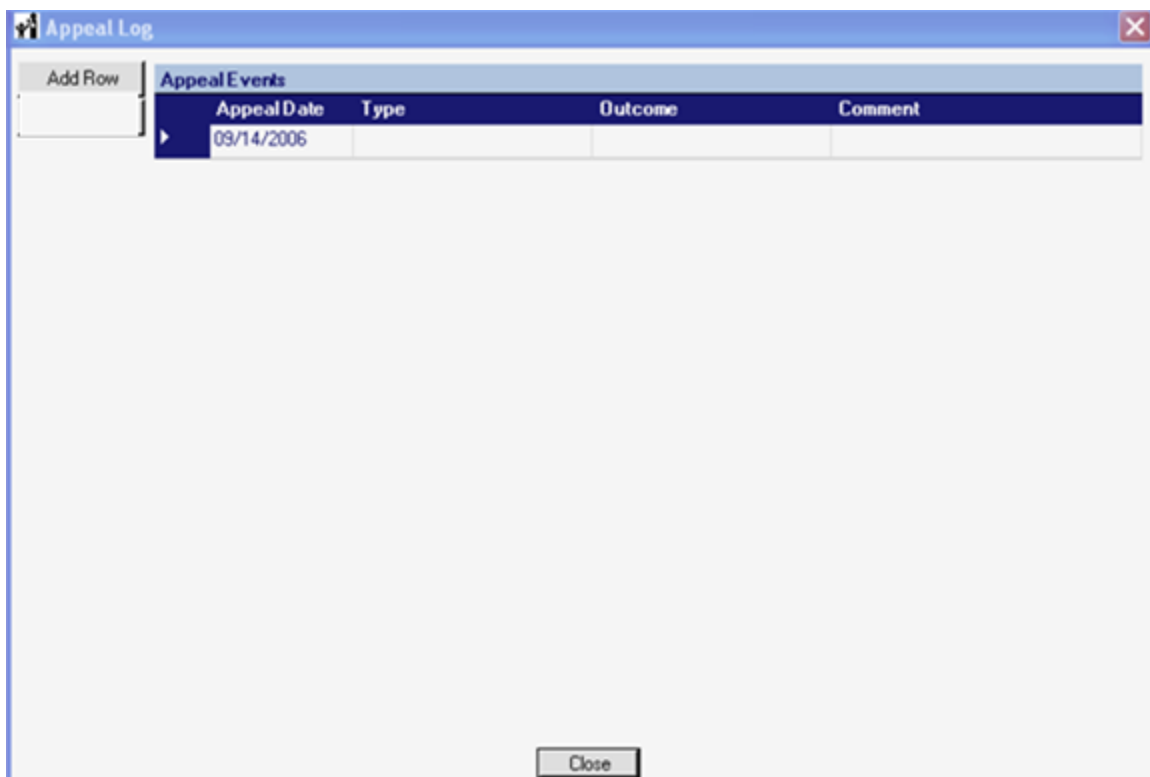
- more than one reason to be selected (when Vendor Status equals Closed).
5. The Appeal Log link is disabled until the Appeal checkbox is selected.

Developer Notes

- 1.

1.6.1.1 Appeal Log Pop-Up Window

The Appeal Log is used to record any appeal events that occur. The pop-up window allows the user to record the appeal date, type, outcome, and any comments that they want to make about the appeal events.



The screenshot shows a pop-up window titled "Appeal Log" with a standard Windows-style title bar (minimize, maximize, close buttons). Inside the window, there is a table with the following structure:

| Appeal Events | | | | |
|---------------|------|---------|---------|--|
| Appeal Date | Type | Outcome | Comment | |
| 03/14/2006 | | | | |

On the left side of the table, there is a vertical button labeled "Add Row". At the bottom center of the window, there is a "Close" button.

| Control | Description | | | |
|-------------|--|---|------------|----|
| Add Row | Clicking the Add Row command button creates a new row in the data grid that allows the user to enter information about the appeal event. | | | |
| | Type | Command Button | | |
| | Hot Key | Alt + A | | |
| Appeal Date | The date of the appeal event. This defaults to current day. | | | |
| | Type | Date Picker | | |
| | Required | Yes | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorInvestAppeal.AppealDt | | |
| Type | List box that contains all available appeal types. | | | |
| | Type | List Box | | |
| | Required | Yes | | |
| | DB Column | VendorInvestAppeal.TypeCd | | |
| | Code ID | Appeal Type This code element is editable but these installed values are non-editable: Administrative | | |
| Outcome | List box that contains all available appeal outcomes. | | | |
| | Type | List Box | | |
| | Required | No | | |
| | DB Column | VendorInvestAppeal.OutcomeCd | | |
| | Code ID | Appeal Outcome This code element is editable but these installed values are non-editable: Pending Upheld Overturned Modified Judicial | | |

| Control | Description | | | |
|----------------------------------|---|---|------------|----|
| Comment | A comment related to the appeal event. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 40 | | |
| | Validation | NA | | |
| | DB Column | VendorInvestAppeal.Comment | | |
| | Display Only | No | Calculated | No |
| Close | Clicking the Close button closes the pop-up window and returns the user to the Status screen. | | | |
| | Type | Command Button | | |
| | Hot Key | Alt + C | | |
| <Last Modified By User and Date> | In the lower right-hand corner, the user and the date of the last update of the record are displayed. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | NA | | |
| | Validation | Mask of 'firstname lastname mm/dd/yyyy' | | |
| | Display Only | Yes | Calculated | No |
| | DB Column | VendorInvestAppeal.ModifyStfpID + VendorInvestAppeal.ModifyDt | | |

Business Rules

1. When the Add Row button is pressed, the Appeal Date is set to current date by default.
2. Duplicate Appeal Dates are allowed. No unique identification is required.

Developer Notes

1. The appeals records are stored in the same table as those appeal records found in the Vendor Management Investigation screen.

1.6.2 Events Summary

The Events Summary window is used to display a summary of changes that occurred for this vendor. This data grid is read-only and summarizes all risk changes, status changes, and training changes for the vendor.

> Details > Status/Summaries/Log > Events Summary

<Vendor Header (See VM overview)>

| Event Summary | | | | |
|---------------|------------|--|-----------------|----------------|
| | Date | Description | Type | User |
| ▶ | 08/28/2006 | Status Changed to Active due to Store Opened. | Status Change | Michael Wilson |
| | 08/28/2006 | Training record created for Initial Training training. | Training Change | Michael Wilson |

| Control | Description | | | |
|---------------|---|------------------------|------------|----|
| Event Summary | The read-only data grid displays a summary of events that occurred specific to the selected vendor. | | | |
| | Type | Read-only Data Grid | | |
| | Display | Yes | | |
| Date | The date the vendor’s record changed. | | | |
| | Format | Date | Calculated | No |
| | DB Column | See developer notes | | |
| Description | The description of the event. | | | |
| | Format | Text | Calculated | No |
| | DB Column | See developer notes | | |
| Type | The type of event that caused the entry to be added to the Event Summary. | | | |
| | Format | Text | Calculated | No |
| | DB Column | See developer notes | | |
| User | The user responsible for the entry added to the Event Summary. The user may be a user or a batch process. | | | |
| | Format | User Name (first last) | Calculated | No |
| | DB Column | See developer notes | | |

Business Rules

- Events include risk changes, status changes and training changes. An entry in the events log is made by finding records for the selected vendor in the training, status, and risk tables.
- Entries from each table are written to the event log with literal strings of text that identify the different columns of the grid.
- Items found in <> are field names from the database table. The field name is substituted by the actual data at run time.
When the record comes from the training table, the phrase "Training Change" is used for the Type, the Description is "Training record created for <TrainReasonCd >", the Date is <PlannedDt>, and the User is the name of the staff person that matches the

Business Rules

<InsertStfpID>.

When the record comes from the status table the phrase "Status Change" is used for the Type, the Description is "Changed to <VendorStatusCd>", the Date is <InsertDt> and the User is the name of the staff person that matches the <InsertStfpID>.

4. When the record comes from the risk table the phrase "Risk Change" is used for the Type, the Description is "Vendor Risk Created for <VendorRiskCd>", the Date is <EffectiveDt> and the User is the name of the staff person that matches the <InsertStfpID>.

Developer Notes

1. This is a union of several tables. The tables involved are VendorTraining, VendorStatus, and VendorRisk.

1.6.3 Violation Summary

The Violation Summary window is used to display a summary of all violations and sanction points for the selected vendor in the last 365 days, a total number of active sanction points, as well as the option to specify specific sanction points to be totaled. The data comes from entries made on the Feedback, Investigations and Monitoring screens. By clicking View All, a complete historical listing of all violations and sanction points for the selected vendor are displayed.

> Details > Status/Summaries/Log > Violation Summary

<Vendor Header (See VM overview)>

Active Sanction Points: 20

Highlight Rows to Calculate Sanction Points:

[View All](#)

| Violation Summary | | | |
|-------------------|--|-----------------|----------------|
| Date | Violation Type | Sanction Points | Origin |
| 11/30/2006 | Allowed To Buy Formula Not On Check | 10 | Investigations |
| 10/24/2005 | Cash/Credit On Return For Other Purchase | 10 | Monitoring |
| 12/17/2004 | Accepting 5 Checks Over 30 Days Old | 5 | Feedback |

| Control | Description | | | |
|---|--|---------------------|------------|-----|
| Active Sanction Points | The total number of active sanction points for the vendor. Active sanction points are those with an end date in the future. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 3 | | |
| | Validation | NA | | |
| | Display Only | Yes | Calculated | Yes |
| | DB Column | NA | | |
| Highlight Rows to Calculate Total Sanction Points | The total number of sanction points based on the rows that the user selects. | | | |
| | Type | Text Box | | |
| | Required | No | | |
| | Length | 3 | | |
| | Validation | NA | | |
| | Display Only | Yes | Calculated | Yes |
| View All | When the View All command button is selected, all violations, both active and historical, for the selected vendor are displayed. | | | |
| | Type | Command Button | | |
| | Hot Key | Alt + V | | |
| Violation Summary | The Violation Summary data grid shows the violations for the selected vendor based on the option selected. | | | |
| | Type | Read-only Data Grid | | |
| | Display Only | Yes | | |
| Date | The date the violation was recorded. | | | |
| | Format | Date | Calculated | No |
| | DB Column | See Business Rules | | |
| Violation Type | The type of violation assigned to the vendor. | | | |
| | Format | Text | Calculated | No |
| | DB Column | See Business Rules | | |
| Sanction | The sanction points assigned for the specific violation. | | | |
| | Format | Number | Calculated | No |
| | DB Column | See Business Rules | | |

| Control | Description | | | |
|---------|--|------|-------------------|----|
| Origin | The Origin displays where the recording of the violation occurred. Origin may be Investigations, Monitoring or Feedback. | | | |
| | Format | Text | Calculated | No |

Business Rules

1. The user can click a single row or click a row and drag (selecting multiple rows). As the user does this, Highlight Rows to Calculate Sanction Points is updated with the accumulated amount for this selection.
2. The grid is populated based on the last 365 days. Active sanction points are calculated by adding sanction points assigned in the last 365 days. This is a rolling 365 days.
3. Clicking the View All button results in all violations for the selected vendor being displayed. These include the violations for the last 365 days as well as any that preceded that time.
4. An entry in the violation summary is made by finding records for the selected vendor in the monitoring, investigation, and feedback tables.
5. Items found in <> are field names from the database table. The field name will be substituted by the actual data at run time.
 When the record comes from the monitoring table the Date is the <InsertDt>, the Violation Type is <VendorViolationType>, the Points is <SanctionPoints>, the Origin is "Monitoring."
 When the record comes from the investigation table the Date is the <InsertDt>, the Violation Type is < VendorViolationType>, the Points is <SanctionPoints>, the Origin is "Violations."
 When the record comes from the feedback table the Date is InsertDt, the type is ComplaintTypeCd, the Points is <SanctionPoints>, the Origin is "Feedback."
6. The records in the grid are sorted by Date, descending, followed by Violation Type, ascending, and then Origin, ascending.

Developer Notes

1. This is a union of several tables. The tables involved are: RoutineMonitoringViolation, VendorInvActViolation and VendorFeedbackViolation.

1.6.4 Vendor Log

The Vendor Log screen is used to record any contact made between a vendor coordinator and the vendor. The screen allows the user to record the date, method of contact, subject discussed, and a comment about the communication that occurred with the vendor.

> Details > Status/Summaries/Log > Vendor Log

<Vendor Header (See VM overview)>

The screenshot displays a web-based form for logging vendor information. At the top left, there is a link labeled "Log Dates". To its right is a date selection dropdown currently showing "06/15/2007". Further right is a toolbar containing a magnifying glass icon, navigation arrows, a page indicator showing "1 of 99", and three action buttons: "New" (with a plus icon), "Edit" (with a pencil icon), and "Delete" (with a red X icon). Below the date and toolbar, there are two dropdown menus labeled "Method Of Contact" and "Subject". The "Comment" field is a large text area with a vertical scrollbar on the right and a horizontal scrollbar at the bottom. The entire form is set against a light blue background.

| Control | Description | | | |
|-------------------|--|--|------------|----|
| Log Dates | The date the user determines the communication occurred with this vendor. | | | |
| | Type | Record Selector (using Editable Date Picker) | | |
| | Contents | Date of existing Log records | | |
| | DB Column | VendorEventLog.EffectiveDt | | |
| New | Clicking the New command button creates a new vendor log record. | | | |
| | Type | Command Button | | |
| | Hot Key | Alt + N | | |
| Edit | Clicking the Edit command button puts the currently displayed record into Edit mode. | | | |
| | Type | Command Button | | |
| | Hot Key | Alt + T | | |
| Delete | Clicking the Delete command button marks the record as deleted in the database upon user confirmation. | | | |
| | Type | Command Button | | |
| | Hot Key | Alt + D | | |
| Method of Contact | The form of communication used to contact the vendor. | | | |
| | Type | List Box | | |
| | Required | Yes | | |
| | DB Column | VendorEventLog.ContactMethodCd | | |
| | Code ID | ContactMethod | | |
| Subject | The subject discussed in the communication with the vendor. | | | |
| | Type | List Box | | |
| | Required | Yes | | |
| | DB Column | VendorEventLog.SubjectCd | | |
| | Code ID | VendContSubject | | |
| Comment | A comment related to the communication with the vendor. | | | |
| | Type | Multi Line Text Box | | |
| | Required | Yes | | |
| | Display Only | No | Calculated | No |
| | DB Column | VendorEventLog.Comment | | |

| Control | Description | | |
|----------------------------------|--|---|----------------------|
| <Last Modified By User and Date> | In the lower right-hand corner, the user and the date of the last update of the vendor contact record are displayed. | | |
| | Type | Text Box | |
| | Required | No | |
| | Length | NA | |
| | Validation | Mask of 'firstname lastname mm/dd/yyyy' | |
| | Display Only | Yes | Calculated No |
| | DB Column | VendorEventLog.ModifyStfpID + VendorEventLog.ModifyDt | |

Business Rules

1. Duplicate Log Dates are allowed. No unique identification is required as user can scroll through entries.

Developer Notes

- 1.